Manual for using Award Management Module in PURE
I. Applications
II. Ethical Reviews
III. Awards
IV. Milestones
V. Projects
Applications

SECTION I
CREATE A NEW APPLICATION

- Go to the Award Management Module (upper toolbar)
- Select Applications tab and press “+”
DEFINE THE APPLICATION TYPE

1. Select **Application**
2. In the popped out list select **Application** again
3. Proceed with the **Research Councils**
4. Then select **Proposal**
5. Once the **Proposal** is selected, a new window will pop out. **This is your Application form**
FILLING THE APPLICATION FORM

CLASSIFICATIONS

- **Application type:** ignore this
- **Nature of activity type:**
  - select “Add nature of activity type”
  - select “Research”
  - click “Attach”

IDENTIFICATION

- **Title:** type in the title of your proposal
- **Short title:** if any, type a short title of your proposal
- **Acronym:** if any, type an acronym of your proposal
- **Description:** type in the description of your proposal
- **IDs:** disregard this. Once checked for completeness, the Research Administration team will assign a proposal number for you.
**APPLICATION IN PURE (CON’D)**

**APPLICANTS**
- **Related funding applicants:** the system selects you as the PI automatically. In case you want to make any change to this, press “Edit” to the right of your name.
- If there are more applicants, press “Add person”. If the person is an NU faculty member or researcher just type in the name, the system will output the person from the Pure database. If the person is not affiliated with NU, press “Create external person”.
- If there are external entities applying, press “Add organizational unit” and type in the name of the participating organization. If it is already created, the system will output it from the database. Otherwise the entity is not created and you should press “Create external organization”.

**APPLICATION MANAGED BY**
- **Managing organizational unit:** the system selects the Department you are affiliated with automatically. In case you want to make any change to this, press “Change organization”.

**COLLABORATIVE PARTNERS**
- **Collaborative application:** choose either “Yes” or “No”.

**FUNDING OPPORTUNITY**
- **Funding opportunity:** Press on the “+” button and type in the funding opportunity title. The internal grant calls are stored in Pure and the full name of the funding opportunity will appear when you type in its name. Ex: Collaborative Research Program. Select the grant call.
FUNDINGS
- **Fundings**: Press “Add Funding” – a new window will pop out. **STEP 3.4 (next slide)** shows how to complete this section

LIFE CYCLE
- **Exp. Start date**: type in the expected start date of your project
- **Exp. End date**: type in the expected end date of your project

DOCUMENTS
- Press on the “Add document” button to attach the required by the grant call documents. Press on the “Drag file or browse your computer” and choose the file in your computer you wish to attach. Press “Create”
- Repeat this step for every document you wish to attach
- For the internal grant calls, attach the budget of your application already approved and signed by the Executive Director of your School.

FUNDER STATUS
- **Submission date**: Choose the date you intend to submit your proposal on.
**STEP 3.4**

**FUNDING ORGANIZATION**
- **FUNDING ORGANIZATION**: Add the funding organization here (for internal grants – type in “Nazarbayev University”)
- **FUNDING PROJECT SCHEME (RESEARCH PROGRAMME)**: Disregard this subsection

**FINANCIAL SUMMARY**
- **FINANCIAL**: Choose “Financial”
- **APPLIED AMOUNT IN APPLIED CURRENCY**: Disregard this subsection
- **APPLIED AMOUNT**: Type in the full amount you are applying for in the US dollars

**BUDGETS**
- **ADD BUDGET**: Add budget lines by clicking on the “Add budget” button. A new window will pop out (see next slide for more information)
**FUNDINGS: ADDING BUDGET LINES**

**ORGANIZATION**
- **ORGANIZATION**: Choose the entity (your School) that will manage the financial side of your project.

**BUDGET**
- **NEW BUDGET LINE**: To add budget lines, choose a suitable one from the scroll down menu and press “Add line”. The selected budget line will then appear under the “Budget lines” subsection.
- If any, in the “Specification” column type in any budget specification.
- In the “Budget USD” type in the requested amount for the budget line in the US dollars.
- Type in the first year budget for a selected budget line under the column “2019”.
- To add budget for multiple years, press on the “+” sign next to the column “2019”.
- To add more budget lines, press on the “Add line” button and follow the steps above.
- When done, check the “Total” row to make sure that it is equal to the “Applied Amount” (subsection on the previous slide).
APPLICATION IN PURE (CON’D)

RELATED PROJECT

- Related project: Press the “+” button to choose your projects that are related to your application. Please note that the projects need to be stored in Pure beforehand.
- If you do not have your project stored in the Pure system but wish to add it to the application, press “Save” button to save the application first. Then follow the steps in the “Projects” section to complete the project-related information in Pure and store it.
- Re-open your application by pressing on the title of your application in the “Applications” tab of the Award Management Module.

RELATED APPLICATIONS

- Related applications: Press on the “+” button to choose your applications that are related to this application. Please note that the applications need to be stored in Pure beforehand. Follow the same procedures as described in the “Related Project” section to add the related applications.

RELATED AWARDS

- Follow the same procedures as described in the “Related Project” section to add the related awards.

RELATED ETHICAL REVIEWS

- Steps on how to add the Ethical Reviews in Pure are listed in STEP 3.6 (next 2 slides)
Select the “Ethical Reviews” tab under the Award Management module. This tab is located below the “Applications” tab (see Step 1)

Follow the steps below to add the Ethical Review that will be included in your Application

**IDENTIFICATION**

**TITLE:** Type in the title of the Ethical Review

**DESCRIPTION:** Add a brief description of the Ethical Review of your Project

**REPLY:** Choose the option that is applicable to your project. For most of the applications, the reply is usually pending at the moment the application is submitted for review. Within one month after the application is submitted, the PI needs to attached an approved ethical review to the submitted application. Only the applications with high peer-review scores that have ethical approvals will be funded by the funding organization.

**RELATED APPLICATION:** Type in the saved application in the system that you wish to submit for funding.

**PERSONS:** Your name will appear automatically. If there are more people involved, press “Add person”
ETHICAL REVIEW MANAGED BY: The Managing organizational unit will be chosen automatically based on your affiliation at NU.

DOCUMENTS: Attach your approved ethical review and your ethical-review related documents.

LINKS: If there is a link to your ethical review, type it in here

VISIBILITY: Choose “Confidential – Restricted to associated users and editors”. This option will make your application visible only to you, your Department Chair, Executive Director, Dean, and the Office of the Provost – Research Administration.

Status: When completed, choose the status of your Ethical Review. It can be either “Under Review” or “Reply Received”. If you wish to complete the Ethical Review later, choose “Entry in Progress.” When done, press “Save” (otherwise the entered information will not be saved in your Pure profile)
APPLICATION IN PURE (CON’D)

KEYWORDS

Here you may add keywords for your application (not mandatory)

APPLICATION: DIRECTION: Press on the “Add Application: Project Direction” button and check from the list the option that is applicable to your project proposal

APPLICATION: PROJECT INFORMATION: Press on the “Add Application: Project Information” button and check from the list the options that are applicable to your project proposal

TO SOCIAL POLICY GRANT RECIPIENTS: If not a recipient, please disregard this part of the application. If a recipient, press “Add to Social Policy Grant Recipients” and enter the starting and ending dates. Then in the small window, press “If you applied for a grant afterwards, please provide its title below” and enter the title of your SPG project.

VISIBILITY

Choose “Confidential – Restricted to associated users and editors”. This option will make your application visible only to you, your Department Chair, Executive Director, Dean, and the Office of the Provost – Research Administration.
When the application is complete, press “Send to internal approval”. You may add a short comment with the Application if you wish.

If the application is not yet complete and you wish to save it only, press “Save” button.
Press on “My Applications” of the Applications tab of the Award Management module to view all created applications.

If the application received funding, the “Awarded” mark will be shown.

If the application has more steps to complete before being funded, “X additional steps” sign will be shown under the “Application approval route” column. The completed steps are marked in green. The additional steps are marked in yellow. Here you may view under what stage of approval your application is at the moment.
Budget of the project proposal is approved by Executive Director of School.

Application is submitted by PI in Pure.

Application is reviewed by Dean of School.

Application is checked for completeness by Office of Provost – Research Administration.

Application is sent for external peer-review. Ethics Review certifications need to be submitted.

Applications above threshold are reviewed by Research Council. Successful applications receive funding.
Open the Awards tab

In the Award Management Module, select Awards and press the “My awards” subsection.
Click on the title of the Award to view the project in detail. A new window will pop out.

Click on the “Milestones” section to add new milestones to your funded project. The milestones are of 2 types – set for PIs and set for administration.
Your project’s milestones can be viewed under the “Overdue milestones” and “Upcoming milestones” columns.
Press on the “Milestones” tab of the Award Management module to view your milestones.

People responsible for the completion of the milestone are shown under the “Responsible persons” column.

Milestones are grouped by category – overdue milestones, upcoming milestones, indeterminate milestones, completed milestones.
Milestones

SECTION III
Click on the title of the Award to view the project in detail. A new window will pop out.

The award’s details will be listed in the new window.

Click on the (will appear when you place your mouse cursor near the editable text) to add new milestones to your funded project.

Milestones are of 2 types – set for PIs and set for administration.
Press “Add milestones” to enter the award-related milestones.
In a new window, press “+ Add custom milestone” (bottom of the page) and enter the deadline, milestone type (academic (for PI), administrative (for admin)), name (title of the milestone), responsible role (choose: administrator of awards), and Email reminders.

Press “save” next to the “Responsible Role” and then create (bottom of the page).

A new milestone then will be created. It can be checked in the “Milestones” section of the Award Management module.

You will receive an email when the milestone is created and before the milestone is due.
Your project milestones can be viewed under the “Overdue milestones” and “Upcoming milestones” columns.
Press on the “Milestones” tab of the Award Management module to view your milestones.

People responsible for the completion of the milestone are shown under the “Responsible persons” column.

Milestones are grouped by category – overdue milestones, upcoming milestones, indeterminate milestones, completed milestones.
In the Award Management Module, select Projects and press “+” near the Projects tab.
CHOOSE THE PROJECT TYPE IN A POPPED-OUT WINDOW

- Click on the Project;
- In the second column that will appear, click on the Project;
- When you press on the “Research Project”, a new window will pop out. This is your Project in Pure.
The new window is your Project in Pure

**CLASSIFICATIONS**
- **Project type:** Choose “Research project”
- **Nature of activity type:** press on the “Add nature of activity type”; select “Research” and press “Attach”

**IDENTIFICATION**
- **Title:** type in the title of your project
- **Short title:** if any, type a short title of your project
- **Acronym:** if any, type an acronym of your project
- **Call title (Call ID):** type in the call ID of your project
- **Reporting Period:** Type in “Year 2018” if your reporting period is year 2018.
- **Project Description:** type in the description of your project
- **Key Findings:** type in the key finding of your project.
**STEP 3.2**

**PROJECT IN PURE (CON’D)**

**IDs:** disregard this. Once checked for completeness, the Office of the Provost-Research Administration will assign the ID for you.

**PARTICIPANTS**

- **Related project participants:** the system selects you as the PI automatically. In case you want to make any change to this, press “Edit” to the right of your name.
  - If there are more participants, press “Add person” and type in the names of the NU faculty members. As they are in the Pure database, the system will allow you to choose the name. If the person is not an NU faculty member or researcher, press “Create external person”
  - If there are multiple entities applying, press “Add organizational unit” and type in the names of the NU Department/Research Center. As they are stored in Pure, the system will allow you to choose the name from the database. If the entity is not from NU, press “Create external organization”

**PROJECT MANAGED BY**

- **Managing organizational unit:** the system selects the Department you are affiliated with automatically. In case you want to make any change to this, press “Change organization”

**COLLABORATIVE PARTNERS**

- **Collaborative project:** choose either “Yes” or “No”
STEP 3.3

LIFE CYCLE
- **Exp. Start date**: type in the start date of your project
- **Exp. End date**: type in the end date of your project
- Check “Curtailed” if the project has been curtailed

FILES AND LINKS
- **Documents**: Press on the “Add document” button to attach the required by the grant call documents. Press on the “Drag file or browse your computer” and choose the file in your computer you wish to attach. Press “Create”. Repeat this step for every document you wish to attach.
- **Links**: Press on the “Add link” button to add the links. Type in the web address for your project and press “Create”.

RELATED APPLICATIONS AND AWARDS
- **Related applications**: Press on the “+” button to choose your applications that are related to this application. Please note that the applications need to be stored in Pure beforehand.
- **Related Awards**: Follow the same procedures as described above to add the related awards.

PROJECT RELATIONS
- **Related project**: Press on the “+” button to choose your projects that are related to the project you are completing the information for at the moment. Please note that the projects need to be stored in Pure beforehand.
- If you do not have your project stored in the Pure system but wish to add it to the application, press “Save” button to save the current window first. Then follow the steps 1-3 in the “Projects” section to complete the project-related information in Pure and store it.

DATASETS
- Press on the “+” button to add the datasets applicable to your project. Please note that the dataset need to be stored in Pure beforehand.
- If you wish to add the dataset in Pure, go to the “Personal” module > “Datasets” to add the dataset. Do not forget to save the information. Now you may link it to your Project by following the step above.
PROJECT IN PURE (CON’D)

ACTIVITIES
➤ Press on the “+” button to choose the activities that are related to your project. Please note that they need to be stored in Pure beforehand.
➤ If you wish to add the activity in Pure, go to the “Personal” module > “Activities” to add the applicable activity (e.g., add a consultancy work or conference hosted). Do not forget to save the information. Now you may link it in to your Project by following the step above.

PRESS/MEDIA
➤ Press on the “+” button to choose the press/media that is related to your project. Please note that they need to be stored in Pure beforehand.
➤ If you wish to add the activity in Pure, go to the “Personal” module > “Press/Media” to add the applicable information. Do not forget to save the information. Now you may link it in to your Project by following the step above.

FACILITIES/EQUIPMENT
➤ Press on the “+” button to choose the facilities/equipment that is related to your project. Please note that they need to be stored in Pure beforehand. If you cannot find one, send a request to the Office of the Provost – Research Administration to add the missing equipment in Pure.

IMPACTS: Disregard this section

PRIZES
➤ Press on the “+” button to choose the prize that are related to your project. Please note that they need to be stored in Pure beforehand.
➤ If you wish to add the activity in Pure, go to the “Personal” module > “Prizes” to add the applicable prize. Do not forget to save the information. Now you may link it in to your Project by following the step above.

STUDENT THESES
➤ Press on the “+” button to choose the student theses that are related to your project. Please note that they need to be stored in Pure beforehand.
➤ If you wish to add the student theses in Pure, go to the “Personal” module > “Student Theses” to add the applicable information. Do not forget to save the information. Now you may link it in to your Project by following the step above.
Press on the “+” button to choose the research outputs (publications) that are related to your project. Please note that they need to be stored in Pure beforehand.

If you wish to add the research output in Pure, go to the “Personal” module > “Research Outputs” to add the applicable information. Do not forget to save the information. Now you may link it in to your Project by following the step above.

**KEYWORDS**

- **KEYWORDS:** Here you may add keywords for your application (not mandatory)
- **ASJC:** Disregard this subsection

**VISIBILITY:** Choose “Confidential – Restricted to associated users and editors”. This option will make your application visible only to you, your Department Chair, Executive Director, Dean, and the Office of the Provost – Research Administration. When done, press “Save” next to the “For approval” status.